



Americas



Core Skill Sectors and Industry Segments

Largest Healthcare Staffing Firms in the United States

2018 Update

August 31, 2018 | Timothy Landhuis, Director of Research, North America | tlandhuis@staffingindustry.com

Largest Healthcare Staffing Firms in the US: 2018 Update

Key Findings:

- We estimate that 43 firms generated at least \$50 million in US healthcare temporary staffing revenue in 2017. Added together, these firms generated \$11.3 billion in such revenue, accounting for 70% of the market, by our estimates. The complete list of 43 firms can be found starting on page four of this report.
- In this market share report, we have ranked companies in order of revenue size, according to industry custom, but this ranking should not be taken to imply that a firm with a higher rank provides better service or more value to its shareholders.
- Staffing firms varied in degree of financial transparency, and even when forthcoming with information, in some cases data provided was adjusted for greater accuracy and consistency. Therefore, for all firms in this report, revenue shown should be considered an estimation by Staffing Industry Analysts.
- Market share percentages in this report were based on our market estimate of \$16.2 billion for the US healthcare temporary staffing market in 2017. Similarly, market share on our sub-segment rankings were calculated using the following market size estimates: travel nurse (\$5.2B), per diem nurse (\$3.4B), locum tenens (\$3.7B) and allied healthcare (\$3.8B).
- Overall, we believe that this list is accurate and can be used appropriately to get a “big picture” reading of the US healthcare temporary staffing industry landscape. However, as transparency and availability of information from staffing companies can vary from one year to the next, this year’s estimates may not be comparable to those of previous years in all cases. For that reason, we did not display prior year revenue estimates in this report.
- Additional details on the methodology of this report are provided on page 14.

All of the companies included in this report were invited to provide their revenue numbers via online survey in February 2018. For firms that did not participate in the survey, revenue estimates were based on company reports, company websites and other sources. Our market share reports are of strong interest to staffing buyers and we hope those listed will benefit from the increased buyer awareness. Firms not on this list that feel they should have been included are encouraged to contact Staffing Industry Analysts, as we will be releasing a follow-up briefing for any late additions. Many thanks to the staffing firms who offered their encouragement and assistance in this year's report process.

Notes and observations regarding the largest US healthcare staffing firms

- AMN Healthcare retained its place as the largest healthcare staffing firm in the United States, with 10% market share in 2017 by our estimates. AMN Healthcare ranks as the largest travel nurse firm, the largest allied healthcare staffing firm, the third-largest locum tenens firm, and the sixth-largest per diem nurse staffing firm.
- CHG Healthcare ranks as the second-largest healthcare staffing firm by revenue, with 10% market share. CHG Healthcare is the largest locum tenens firm in the US, holding 34% market share in locum tenens by our estimates. CHG also ranks as the seventh-largest allied healthcare staffing firm, and the ninth largest travel nurse firm.
- There were seven companies that qualified for this year's largest healthcare staffing firms ranking that did not appear in last year's report: All Medical Personnel, All Star Recruiting, American Health Staffing Group, Atlas MedStaff, Gifted Healthcare, The Execu|Search Group, and Triage Staffing.
- In the travel nurse segment, there were four companies that qualified for this year's ranking that did not appear in last year's report: American Health Staffing Group, Host Healthcare, InGenesis, and Triage Staffing.
- In the per diem nurse healthcare segment, there were three companies that qualified this year that did not appear last year: GHR Healthcare, Gifted Healthcare, and ProLink Staffing.
- In the locum tenens segment, there was one company that qualified for this year's ranking that did not appear in last year's report: THMED
- In the allied healthcare segment, there were four companies that qualified for this year's ranking that did not appear in last year's report: HCS Healthcare, Maxim Healthcare Services, PrideStaff, and Triage Staffing.
- Market share is most concentrated in the locum tenens segment, and least concentrated in the per diem nurse and allied healthcare segments. The five largest firms in each subsegment hold the following percentage of the market: locum tenens (71%), travel nurse (44%), per diem nurse (25%) and allied healthcare (25%).

Largest Healthcare Staffing Firms in the US: 2018 Update (page 1 of 3)

Ranked by estimated 2017 US healthcare temporary staffing revenue

Rank	Company	2017 US Healthcare Temporary Staffing Revenue (\$million)	Market Share
1	AMN Healthcare¹	1,683	10%
2	CHG Healthcare Services	1,548	10%
3	Cross Country Healthcare²	903	6%
4	Jackson Healthcare	850	5%
5	Aya Healthcare³	444	3%
6	Maxim Healthcare Services	440	3%
7	Aureus Medical Group (C&A Industries)	433	3%
8	HealthTrust Workforce Solutions (HCA)	369	2%
9	Supplemental Health Care	329	2%
10	Medical Solutions	321	2%
11	trustaff	261	2%
12	Soliant Health (Adecco)	260	2%
13	HC Staffing Group Holdings, Fastaff & US Nursing	211	1%
14	FlexCare Medical Staffing	192	1%
14	Vista Staffing Solutions (Envision Healthcare)	192	1%
16	Medicus Healthcare Solutions	190	1%
17	Health Carousel⁴	181	1%
18	InGenesis⁵	175	1%
18	Travel Nurse Across America⁶	175	1%
20	Loyal Source	160	1%

1. Does not include revenue from acquisition of MedPartners in 2Q18.

2. Includes revenue from acquisition of Advantage RN in 2Q17.

3. Includes revenue from acquisition of RN & Allied Specialties in 3Q17.

4. Includes revenue from acquisition of Medical Staffing Options (1Q17).

5. Does not include revenue from acquisition of Kelly Healthcare Resources in 1Q18.

6. Includes revenue from acquisition of Trinity Healthcare Staffing Group (1Q17).

The revenue figures above represent SIA's best estimation based on available information at the time of publication. The accuracy of estimates may vary depending on multiple factors, including firms' willingness to provide or confirm information about their operations

Largest Healthcare Staffing Firms in the US: 2018 Update (page 2 of 3)

Ranked by estimated 2017 US healthcare temporary staffing revenue

Rank	Company	2017 US Healthcare Temporary Staffing Revenue (\$million)	Market Share
21	Accountable Healthcare Staffing ⁷	151	1%
22	Advanced, Inc.	145	1%
23	TekPartners/MedPartners ⁸	144	1%
24	Favorite Healthcare Staffing	122	1%
25	The Delta Companies	104	1%
26	CareerStaff Unlimited (Genesis HealthCare)	101	1%
27	Medix	97	1%
28	D&Y (TeamHealth)	90	1%
29	CoreMedical Group	88	1%
30	ATC Healthcare	84	1%
31	Hayes Locums	83	1%
32	All Star Recruiting	76	<1%
33	Atlas MedStaff	75	<1%
34	American Health Staffing Group ⁹	70	<1%
35	Triage Staffing	67	<1%
36	HealthCare Support	63	<1%
37	Nightingale Nurses	60	<1%
38	The Execu Search Group	59	<1%
39	LiquidAgents Healthcare	58	<1%
40	Gifted Healthcare	57	<1%

7. Acquired by Mitsui & Co. Ltd. in 3Q17.

8. MedPartners division was acquired by AMN Healthcare in 2Q18.

9. Includes revenue from acquisitions of Thaxton Barabe (2Q17), Expedient Medstaff (3Q17) and Advance Med (4Q17).

The revenue figures above represent SIA's best estimation based on available information at the time of publication. The accuracy of estimates may vary depending on multiple factors, including firms' willingness to provide or confirm information about their operations

Largest Healthcare Staffing Firms in the US: 2018 Update (page 3 of 3)

Ranked by estimated 2017 US healthcare temporary staffing revenue

Rank	Company	2017 US Healthcare Temporary Staffing Revenue (\$million)	Market Share
41	Interim HealthCare	56	<1%
42	All Medical Personnel	55	<1%
42	Emerald Health Services (Epic Healthcare Staffing) ¹⁰	55	<1%
Total		11,277	70%

10. Acquired by Webster Capital in 1Q18.

The revenue figures above represent SIA’s best estimation based on available information at the time of publication. The accuracy of estimates may vary depending on multiple factors, including firms’ willingness to provide or confirm information about their operations.

Largest Travel Nurse Staffing Firms in the US: 2018 Update (page 1 of 2)

Ranked by estimated 2017 US travel nurse temporary staffing revenue

Rank	Company	2017 US Travel Nurse Temporary Staffing Revenue (\$million)	Market Share
1	AMN Healthcare	917	18%
2	Aya Healthcare ¹	442	9%
3	Cross Country Healthcare ²	416	8%
4	Medical Solutions	311	6%
5	HC Staffing Group Holdings, Fastaff & US Nursing	211	4%
6	trustaff	206	4%
7	Aureus Medical Group (C&A Industries)	201	4%
8	FlexCare Medical Staffing	187	4%
9	CHG Healthcare Services	178	3%
10	Travel Nurse across America ³	175	3%
11	Maxim Healthcare Services	162	3%
12	Health Carousel ⁴	157	3%
13	Supplemental Health Care	139	3%
14	Jackson Healthcare	110	2%
15	InGenesis	103	2%
16	Soliant Health (Adecco)	90	2%
17	HealthTrust Workforce Solutions (HCA)	86	2%
18	Advanced, Inc.	83	2%
19	Atlas MedStaff	75	1%
20	Loyal Source	70	1%

1. Includes revenue from acquisition of RN & Allied Specialties in 3Q17.

2. Includes revenue from acquisition of Advantage RN in 2Q17.

3. Includes revenue from acquisition of Trinity Healthcare Staffing Group (1Q17).

4. Includes revenue from acquisition of Medical Staffing Options (1Q17).

The revenue figures above represent SIA's best estimation based on available information at the time of publication. The accuracy of estimates may vary depending on multiple factors, including firms' willingness to provide or confirm information about their operations.

Largest Travel Nurse Staffing Firms in the US: 2018 Update (page 2 of 2)

Ranked by estimated 2017 US travel nurse temporary staffing revenue

Rank	Company	2017 US Travel Nurse Temporary Staffing Revenue (\$million)	Market Share
21	Nightingale Nurses	60	1%
22	LiquidAgents Healthcare	58	1%
23	Emerald Health Services (Epic Healthcare Staffing) ⁵	55	1%
24	CoreMedical Group	52	1%
25	American Health Staffing Group ⁶	48	1%
26	Accountable Healthcare Staffing ⁷	47	1%
27	TRS Healthcare	44	1%
28	OneStaff Medical	41	1%
29	Cirrus Medical Staffing (Epic Healthcare Staffing) ⁸	40	1%
30	Favorite Healthcare Staffing	37	1%
31	Triage Staffing	34	1%
32	Host Healthcare	28	1%
32	Randstad Healthcare	28	1%
Total		4,891	94%

5. Acquired by Webster Capital in 1Q18.

6. Includes revenue from acquisitions of Expedient Medstaff (3Q17) and Advance Med (4Q17).

7. Acquired by Mitsui & Co. Ltd. in 3Q17.

8. Acquired by Webster Capital in 4Q17.

The revenue figures above represent SIA's best estimation based on available information at the time of publication. The accuracy of estimates may vary depending on multiple factors, including firms' willingness to provide or confirm information about their operations.

Largest Per Diem Nurse Staffing Firms in the US: 2018 Update

Ranked by estimated 2017 US per diem nurse temporary staffing revenue

Rank	Company	2017 US Per Diem Nurse Temporary Staffing Revenue (\$million)	Market Share
1	Cross Country Healthcare ¹	248	7%
2	HealthTrust Workforce Solutions (HCA)	231	7%
3	Maxim Healthcare Services	165	5%
4	Supplemental Health Care	115	3%
5	Accountable Healthcare Staffing ²	86	3%
6	AMN Healthcare	73	2%
7	ATC Healthcare	66	2%
8	Favorite Healthcare Staffing	60	2%
9	GrapeTree Medical Staffing	49	1%
9	Interim HealthCare	49	1%
11	CareerStaff Unlimited (Genesis HealthCare)	45	1%
12	Dedicated Nursing Associates (DNA)	41	1%
13	Gifted Healthcare	37	1%
14	InGenesis	34	1%
15	ProLink Staffing	28	1%
16	GHR Healthcare ³	25	1%
Total		1,352	40%

1. Includes revenue from acquisition of Advantage RN in 2Q17.

2. Acquired by Mitsui & Co. Ltd. in 3Q17.

3. Includes revenue from acquisition of General Healthcare Resources in 2Q17.

The revenue figures above represent SIA's best estimation based on available information at the time of publication. The accuracy of estimates may vary depending on multiple factors, including firms' willingness to provide or confirm information about their operations.

Largest Locum Tenens Staffing Firms in the US: 2018 Update

Ranked by estimated 2017 US locum tenens temporary staffing revenue

Rank	Company	2017 US Locum Tenens Temporary Staffing Revenue (\$million)	Market Share
1	CHG Healthcare Services	1,256	34%
2	Jackson Healthcare	575	16%
3	AMN Healthcare ¹	428	12%
4	Vista Staffing (Envision Healthcare Holdings)	192	5%
5	Medicus Healthcare Solutions	190	5%
6	Cross Country Healthcare	95	3%
7	D&Y (TeamHealth)	90	2%
8	Hayes Locums	83	2%
9	All Star Recruiting Locums	76	2%
10	The Delta Companies	67	2%
11	Interim Physicians	41	1%
12	Tusk Enterprises	40	1%
13	Loyal Source	30	1%
14	THMED	28	1%
15	Maxim Healthcare Services	27	1%
Total		3,218	87%

1. Does not include revenue from acquisition of MedPartners in 2Q18.

The revenue figures above represent SIA's best estimation based on available information at the time of publication. The accuracy of estimates may vary depending on multiple factors, including firms' willingness to provide or confirm information about their operations.

Largest Allied Healthcare Staffing Firms in the US: 2018 Update (page 1 of 2)

Ranked by estimated 2017 US allied healthcare temporary staffing revenue

Rank	Company	2017 US Allied Healthcare Temporary Staffing Revenue (\$million)	Market Share
1	AMN Healthcare ¹	264	7%
2	Aureus Medical Group (C&A Industries)	232	6%
3	Jackson Healthcare	165	4%
4	Soliant Health (Adecco)	160	4%
5	Cross Country Healthcare	144	4%
6	TekPartners/MedPartners ²	126	3%
7	CHG Healthcare Services	114	3%
8	Medix	97	3%
9	Maxim Healthcare Services	86	2%
10	Supplemental Health Care	76	2%
11	HealthCare Support ³	63	2%
12	Advanced, Inc.	62	2%
13	Loyal Source	60	2%
14	CareerStaff Unlimited (Genesis HealthCare)	50	1%
15	HealthTrust Workforce Solutions (HCA)	48	1%
15	Kelly Services ⁴	48	1%
17	The Execu Search Group	43	1%
18	The Judge Group	42	1%
19	All Medical Personnel	40	1%

1. Does not include revenue from acquisition of MedPartners in 2Q18.
2. MedPartners division was acquired by AMN Healthcare in 2Q18.
3. Does not include revenue from acquisition of HCS Healthcare (3Q18).
4. Acquired by InGenesis in 1Q18.

The revenue figures above represent SIA's best estimation based on available information at the time of publication. The accuracy of estimates may vary depending on multiple factors, including firms' willingness to provide or confirm information about their operations.

Largest Allied Healthcare Staffing Firms in the US: 2018 Update (page 2 of 2)

Ranked by estimated 2017 US allied healthcare temporary staffing revenue

Rank	Company	2017 US Allied Healthcare Temporary Staffing Revenue (\$million)	Market Share
20	InGenesis ⁵	38	1%
20	The Delta Companies	38	1%
22	truststaff	36	1%
23	Triage Staffing	33	1%
24	Yoh	32	1%
25	Ardor Health Solutions	29	1%
25	CoreMedical Group	29	1%
25	HCS Healthcare ⁶	29	1%
28	PrideStaff	27	1%
29	Therapy Source	26	1%
30	Favorite Healthcare Staffing	25	1%
Total		2,262	60%

5. Does not include revenue from acquisition of Kelly Healthcare Resources in 1Q18.

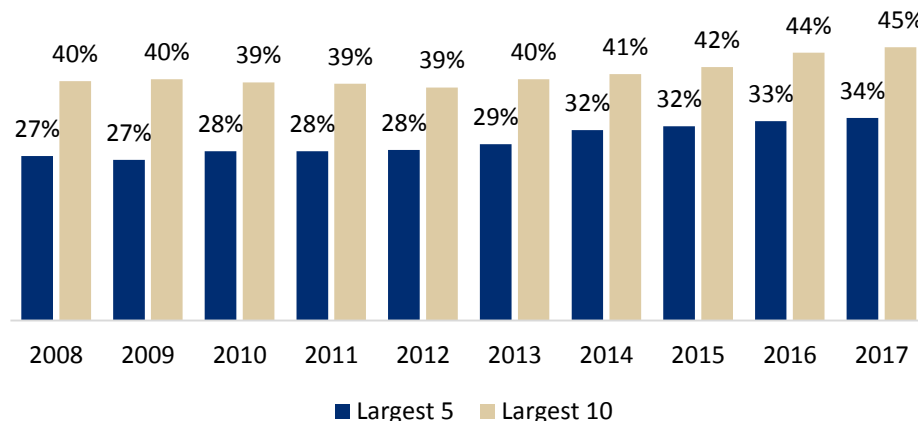
6. Acquired by HealthCare Support Staffing in 3Q18. Formerly known as Healthcare Scouts prior to 3Q17.

The revenue figures above represent SIA's best estimation based on available information at the time of publication. The accuracy of estimates may vary depending on multiple factors, including firms' willingness to provide or confirm information about their operations.

Market share held by the largest healthcare staffing firms has steadily increased over the past four years

- The chart at right shows the combined market share of the five largest and ten largest healthcare temporary staffing firms from 2008 to 2017, according to our annual reports on the largest staffing firms in the US.
- The market share captured by the five largest and ten largest healthcare staffing firms remained roughly the same from 2008 to 2012.
- However, the market share increased during the period from 2012 to 2017. We note that this trend of consolidation was aided in 2014 by Cross Country Healthcare’s acquisition of Medical Staffing Network (the fourth-largest firm acquiring the sixth-largest firm, by 2013 healthcare staffing revenue).
- In 2017, the largest healthcare staffing firms increased their market share due to organic growth along with expansion via acquisitions (for example, Cross Country Healthcare acquired Advantage RN.)

Combined market share of the 5 largest and 10 largest US healthcare staffing firms, 2008 to 2017



Additional notes and explanation of methodology

- For the purposes of this report, we define “temporary staffing” revenue as revenue generated from the provision of temporary workers to business clients. Direct hire, retained search, and temp-to-hire revenue is not included. We also exclude revenue generated from other services offered by staffing companies: consulting services where billing is based on deliverables; process outsourcing (MSP, RPO, HRO); PEO and payrolling; outplacement; VMS; online staffing and “human cloud” services.
- We define “healthcare” temporary staffing as the furnishing of temporary workers in healthcare occupations. Travel nurse staffing typically involves relocation for work assignments typically 13 weeks in length. Per diem nurse staffing typically involves filling assignments of less than two weeks. Locum tenens (latin for “holding the place”) involves temporary staffing of physicians, dentists and advanced practitioners. Allied staffing refers to all other healthcare professionals, with prominent examples being physical, occupational, and speech therapy, imaging technicians, phlebotomists and pharmacists.
- To the extent that we are able, the 2017 staffing revenue estimates shown in this report include the full-year (“pro forma”) 2017 revenue of any staffing companies acquired during 2017. We do this to more accurately reflect annual market share of the acquiring firm moving forward. We call out noteworthy staffing firm acquisitions in the footnotes of this report.
- Revenue estimates reflect calendar year 2017 and include gross staffing revenue generated by franchises.
- Due to the complexity involved with producing the staffing revenue estimates in this report, the presence of acquisition revenue, and variability from one year to the next in the transparency and availability of revenue data from staffing companies, comparisons of revenue estimates from last year’s report and this year’s report do not necessarily provide a reliable measure of revenue growth at a particular company or for a particular segment. For better insight on revenue growth trends in the US staffing industry, we recommend our US Staffing Industry Forecast report.
- Regarding the data sources used for this report, we invited staffing firms in February to complete a detailed Excel-based application form indicating 2017 staffing revenue by country and occupational segment. A majority of the companies appearing in this report supplied revenue information via the application form, which was then validated by comparison with other publicly available data. For companies that chose not to supply revenue information, we made staffing revenue estimates based on publicly available information and our industry knowledge. Revenue estimates were sent to company management for review, and in many cases feedback received resulted in more accurate final estimates.
- We invite our readers to contact us with any questions on our revenue estimates and we welcome feedback or additional data that will assist us in our research coverage and improve our revenue estimates related to the companies featured in this report.

About Staffing Industry Analysts (SIA)





Founded in 1989, SIA is the global advisor on staffing and workforce solutions. Our proprietary research covers all categories of employed and non-employed work including temporary staffing, independent contracting and other types of contingent labor.

SIA's independent and objective analysis provides insights into the services and suppliers operating in the workforce solutions ecosystem including staffing firms, managed service providers, recruitment process outsourcers, payrolling/compliance firms and talent acquisition technology specialists such as vendor management systems, online staffing platforms, crowdsourcing and online work services. We also provide training and accreditation with our unique Certified Contingent Workforce Professional (CCWP) program.

Known for our award-winning content, data, support tools, publications, executive conferences and events, we help both suppliers and buyers of workforce solutions make better-informed decisions that improve business results and minimize risk. As a division of the international business media company, Crain Communications Inc., SIA is headquartered in Mountain View, California, with offices in London, England.

For more information: www.staffingindustry.com

Global coverage across the workforce solutions ecosystem, and latest SIA research and related news, follow us

 @SIAnalysts, @SIAResearch and connect via    YouTube